

USDA Foreign Agricultural Service

GAIN Report

Global Agricultural Information Network

THIS REPORT CONTAINS ASSESSMENTS OF COMMODITY AND TRADE ISSUES MADE BY USDA STAFF AND NOT NECESSARILY STATEMENTS OF OFFICIAL U.S. GOVERNMENT POLICY

Required Report - public distribution

Date: 12/13/2013

GAIN Report Number: ID1358

Indonesia

Retail Foods

Indonesia Retail Report Update 2013

Approved By:

Ali Abdi

Prepared By:

Fahwani Y. Rangkuti and
Thom Wright

Report Highlights:

While traditional markets still account for the majority of retail food sales in Indonesia, modern retail holds a significant share and is growing. Traditional retail outlets to include wet markets and independent grocery stores are gradually being replaced by modern outlets. The burgeoning hypermarket, supermarket and minimarket sectors are opportunities for U.S. food products. U.S. apple, table grapes, processed fruit and vegetables products as well as snack food enjoy a prominent position in Indonesia's retail outlets as well as traditional markets. Further growth and changes in consumer preferences, along with improved refrigeration and storage facilities, will also create additional opportunities for U.S. exporters.

Post:
Jakarta

Executive Summary: Trends and Outlook

Indonesia is the 4th most populous nation in the world with approximately 240 million people. Over 50 percent of the population is between the ages of 5 and 34 years. Emerging middle class consumers are well educated and have a growing interest in imported goods, particularly for consumer products such as processed foods. In 2012, GDP distribution at current prices showed that household consumption expenditures was 24.5 percent on food and 30.5 percent on non-food items (2012 GDP was \$875 billion/IDR 8,241 trillion). A report by a major multinational bank indicates that Indonesia's middle class was 1.6 million in 2004, 50 million in 2009, and is projected to reach 150 million by 2014.

Hypermarkets, supermarkets, and minimarkets are developing rapidly in Indonesia as purchasing power increases. Development is primarily occurring in urban areas, and the prospects for the continued retail sector expansion throughout Indonesia remain promising. However, land availability and receiving necessary permits from local government officials can be a constraint.

Several Indonesian regulations play an important role in modern retail expansion:

- Presidential Regulation No 111/2007 states that supermarkets smaller than 1,200 square meters and minimarkets below 400 square meters should be owned by Indonesian investors.
- Presidential Regulation No 112/2007 and Ministry of Trade Regulation (MOT) No. 53/2008 regulates the size, ownership and distance of new modern outlets from traditional markets. They also provide guidelines on listing fees, discounts and promotional costs.
- Franchise regulations on modern retail (MOT No 68/2012) limit the number of outlets owned by a retailer to 150. If a retailer already has more than 150 outlets, forty percent of the rest of the existing stores should be franchised to a third party within 5 years. The outlets are also required to sell a minimum of 80 percent of local products out of the total number of goods traded.
- The Empowerment and Protection of Farmer Law No. 19/2013 will limit the expansion of modern retail outlets that are not owned and or cooperate with Farmer Groups, Farmer Association, Cooperatives, and/or other Farmer Economic Institution in their Agricultural commodity production district.

Local government bodies have also limited permits for new convenience stores due to protests from traditional market retailers. They enforce zoning and operating hour rules on convenience store and minimarket franchises (Presidential Decree No 112/2007 regulates the operating hours from 10 am – 10 pm Monday to Friday and 10 am to 11 pm on Saturday and Sunday).

The food retail sector is concerned by issues surrounding the issuance of imported product registration numbers (ML). All packaged foods imported for retail purposes must obtain an ML number. Importers report that obtaining the number is time consuming, and that requirements can be confusing and excessive. A number of other persistent market access issues, such as import permits, quotas, and

frequently changing trade regulations continue to threaten U.S. food exports intended for the Indonesian retail sector.

Enforcement of food product regulations often lacks transparency and consistency. The lack of infrastructure, including, but not limited to poor port facilities, supply chain management, and cold chain facilities also creates a drag on the wider distribution of food products throughout Indonesia.

I. MARKET SUMMARY

The Indonesian retail sector began its rapid expansion in 1999, when a Presidential Decree (No. 96/2000 and 118/2000) allowed Carrefour, a French retailer, to expand retail operations in Jakarta. As other retailers followed, the Indonesian retail sector became more competitive, benefitting consumers and taking market share from traditional retail outlets. Foreign retailers in Indonesia include Carrefour (Operated by CT Corp/PT Trans Retail), Giant, Lotte Mart (formerly Makro), Lion Superindo, Circle K, Seven Eleven, Lawson, Family Mart and Ministop. Some modern retailer chains have multi-format outlets. Hypermarket, supermarkets, convenience shops and minimarkets are all present in Jakarta.

Table 1. Indonesia: Grocery Retailers Brand Shares (% sales value)

Brand	Company	2009	2010	2011	2012
Wholesale/Hypermarket					
Carrefour	Trans Retail Indonesia, PT	1.5	1.4	1.5	1.4
Hypermart	Matahari Putra Prima Tbk, PT	0.9	1.0	1.0	1.1
Giant	Hero Supemarket Tbk, PT	0.9	0.9	1.0	1.1
Lotte Mart	Lotte Shopping Indonesia, PT	-	0.0	0.0	0.1
Supermarket					
Superindo	Lion Superindo – Gelael, PT	0.3	0.3	0.4	0.4
Alfa Midi	Midi Utama Indonesia Tbk, PT	0.1	0.2	0.3	0.4
Foodmart	Matahari Putra Tbk, PT	0.1	0.1	0.1	0.1
Hero	Hero Supemarket Tbk, PT	0.1	0.1	0.1	0.1
Minimarket/Convenience Store					
Alfamart (minimarket)	Sumber Alfaria Trijaya, PT	1.6	2.0	2.3	2.5
Indomart (minimarket)	Indomarco Prismaatama, PT	1.2	1.5	1.8	2.0
Circle K	Indonesia Utama, PT	0.1	0.1	0.1	0.1
Others		93.4	92.5	91.5	90.8

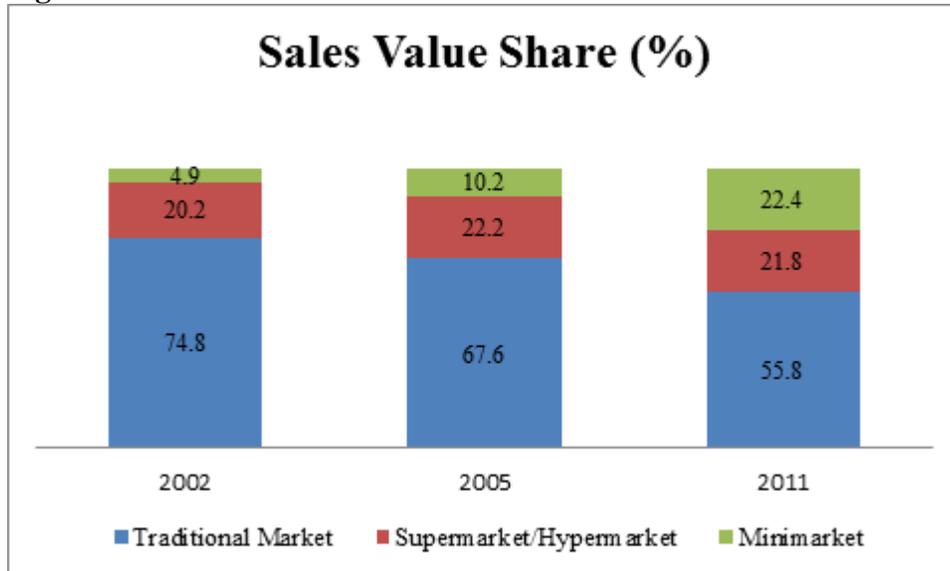
Source: Euromonitor

Convenience stores are expanding rapidly in Indonesia. Following the introduction of 7-Eleven in 2009, the stores have grown in popularity amongst young consumers and students. Convenience stores differ from Indonesian minimarkets in that they offer fewer SKUs (Stock Keeping Units) than minimarkets while offering ready to eat foods and a dining area. Locally owned minimarkets are progressively expanding to residential and office areas throughout Java, Bali and other provinces. Minimarkets are in direct competition with traditional independent small grocers (warungs), on the basis of price, cleanliness, food safety, and comfort. Independent small grocers face this challenge by

offering personalized, flexible services to their community.

There are a variety of specialty stores serving high-end consumers in major urban areas. These businesses specialize in imported goods, fruit boutiques, dairy, fish and poultry products (owned by integrated poultry companies). Western-style bakeries are also growing due to new consumer awareness of western style breads and pastries. The Kalbe E-store offers online retail and home delivery services for grocery and health products. Many of these stores have suffered from import registration number (ML) requirements for processed food and retail packaging issues.

Figure 1. Indonesia Retail Sales Value Share



Source: Kontan March 4-10, 2013

Food Products and Service Offered by Retailers

Hypermarkets and supermarkets offer a wide range of food and beverage products and are generally located as anchor stores in shopping centers. One way they differentiate themselves from local retailers is by marketing high-quality fresh produce, a substantial portion of which is imported. Indonesian middle and upper income level consumers are increasingly shopping at these stores.

Table 2. Indonesia: Sales of Packaged Food in 2012 (Values in IDR Trillion)

Product	Volume		Value (IDR Trillion)
	Retail	Growth 2011/2012 (%)	Retail
Baby food ('000 ton)	242.1	8.50	23.1
Bakery products ('000 ton)	758.8	4.72	30.9
Canned/preserved food ('000 ton)	89.0	11.44	4.4
Chilled processed food ('000 ton)	15.0	9.79	1.1
Confectionery (000 ton)	255.4	4.70	16.9
Dairy products (not countable)	837.9	6.20	24.1

Dried processed food ('000 ton)	8,175.6	4.85	75.6
Frozen processed food ('000 ton)	66.87	9.71	5.3
Ice cream (million liters)	78.0	7.06	4.1
Noodles ('000 ton)	1,206.2	3.97	19.8
Oils and fats ('000 ton)	785.3	7.60	15.3
Pasta ('000 ton)	5.0	6.00	0.2
Sauces, dressings and condiments ('000 ton)	439.9	6.22	10.2
Spreads ('000 ton)	15.0	6.31	0.9
Sweet and savory snacks ('000 ton)	284.3	6.73	12.0
Meal replacement products, Ready meals, Snack Bars, Soup ('000 ton)	2.9	9.33 (Meal RP); 4.82 (Ready Meals); 57.87 (Snack Bars); 7.64 (Soup)	0.5

Source: Euromonitor

Supermarket retailers usually contain in-store bakeries, cafés and restaurants, and prepared meals, with grocery products typically contributing about 65 percent of total sales. Additional in-store services beyond typical food retailing are expected to grow. These include credit and debit card services, ATMs, floral departments, laundry services, home delivery services, and delis/restaurants. Indonesian supermarkets also offer pre-paid mobile phone credits, liquefied petroleum gas (LPG), and store credit cards in cooperation with banks.

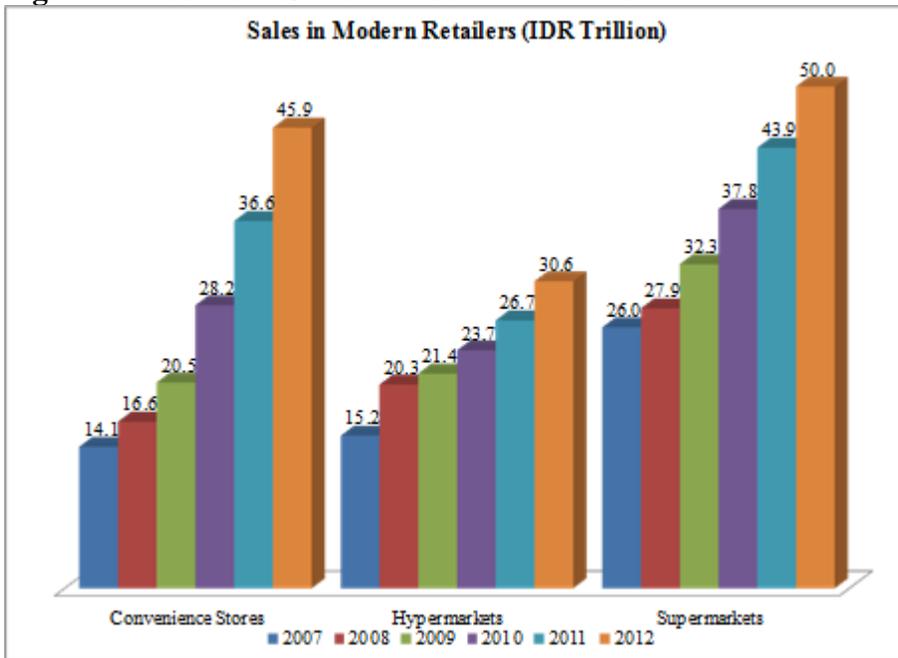
Minimarkets, convenience stores, and other shops carry a wide range of convenience food items such as readymade meals, bakery products, processed foods, ice cream, and beverages. They sometimes carry a limited offering of fresh fruits and are open 24 hours. In addition to food and beverages, minimarkets also provide train tickets, concert and sporting event tickets, pre-paid mobile phone credits, ATMs, Citilink airline tickets, laundry, bill payment services (electricity, motorcycle loan payments), BNI bank and Western Union remittances, taxi ordering, and online shopping and delivery (within the Jakarta region). Franchising is driving the rapid growth of minimarkets and convenient stores.

While traditional small grocers (warungs) may not be able to offer the variety of products and services offered by minimarkets, they do sell local food and beverage products familiar to the majority of consumers. This differentiation, along with location, helps them remain competitive against organized retail. Traditional markets also remain an important retailer in Indonesia. A 2010 Nielsen Shopper trends survey showed that buyers purchased 53 percent of fresh vegetables, 70 percent of fresh meat, and 67 percent of fresh fish in traditional markets. Like small grocers, they rely on personalized services, local product offerings, and location to remain competitive. A University of Adelaide study (Hery Toiba, 2011) showed that quality perceptions amongst Indonesian consumers also favor traditional markets in several categories. For example:

- Price: Indonesian consumers tend to believe that traditional retail has lower costs across all categories except dairy and processed food.
- Quality & Safety: Indonesian consumers tend to believe that food safety is better assured by traditional retailers for meat and seafood, while modern retail is perceived to provide safer fruits, dairy and processed foods.
- Product information: Indonesian consumers reported that they regard modern retail as more

transparent and forthcoming with product information across all categories except fresh produce.

Figure 2. Indonesia: Sales in Modern Retailers



Source: Euromonitor

Modern Retail Market Growth

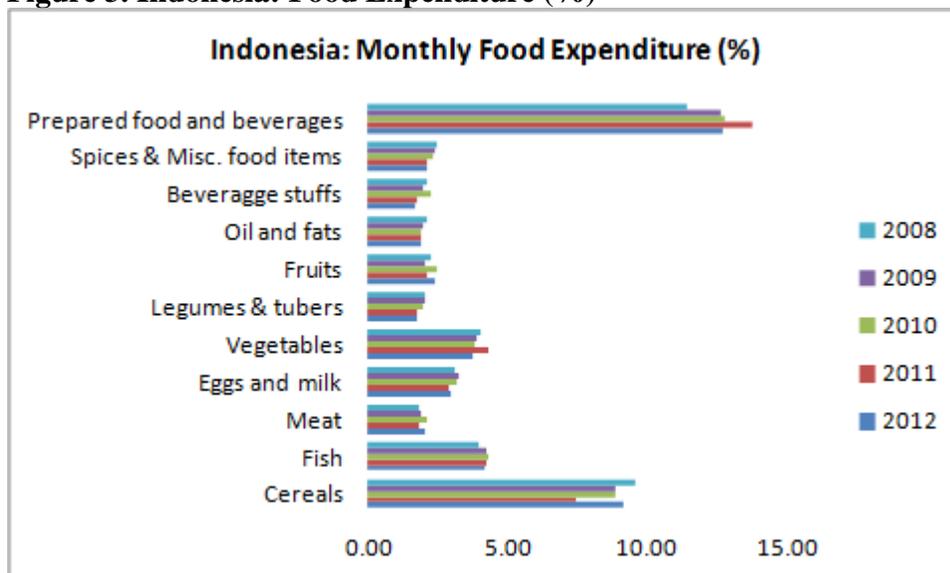
Modern retail sales in urban areas across Indonesia are expected to grow an average of 7.3 percent/year during 2012 to 2017 (Euromonitor).

Indonesian supermarkets experience their peak hours during weekends with 34 to 45 percent of footfalls occurring at these times. Minimarket peak hours are usually at night. Traditional outlets such as neighborhood stores and wet markets experience heaviest traffic on weekday mornings. A recent Nielsen report claims that Indonesian consumers prefer to purchase certain specialty items from the organized sector (dairy, vitamin and personal care products), while commodity goods (instant noodles, cooking oil, soy sauce) continue to be procured from traditional sources.

The 'recreation' function of modern outlets is important in Indonesia, with 79 percent of consumers visiting supermarkets with their families. This trend is encouraged by Jakarta's numerous shopping malls and growing mall culture. Conversely, more than 65 percent of consumers prefer to visit traditional markets alone. As a relatively new concept, consumers continue to familiarize themselves with modern retail, indicating potential for future growth of the sector.

In 2012 the monthly average expenditure per capita for food was Rp 323,478 (\$34.32). This averaged to be about 51.0 percent of total monthly expenditures per capita. Recent shortages (due to opaque import regulations) combined with a 33.3 percent fuel price increase in June 2013, led to food inflation and weakened purchasing power. A breakdown of average expenditures is as follows:

Figure 3. Indonesia: Food Expenditure (%)



Source: National Statistical Agency (BPS)

Distribution Channels

Wholesale and hypermarket outlets procure from domestic suppliers or directly from manufacturers and importers. Suppliers of small retail outlets deliver the products to retailer's distribution center. Ministry of Agriculture (MOA) and Ministry of Trade (MOT) regulations limit the sale of imported beef to the hotel and restaurant industry. Indonesian regulations also prohibit retailers from purchasing imported horticultural products directly from importers, limiting product availability and increasing prices.

Table 3: ADVANTAGES AND CHALLENGES FACING U.S. PRODUCTS MARKET	
ADVANTAGES	CHALLENGES
Large Consumer Base: Indonesia has a population of 240 million people, with 150 million people projected to join the middle class by 2014.	Weak purchasing power of the majority of the population.
The distribution system on the island of Java is improving, providing increased access to a population of 136.6 million.	Infrastructure, including ports and cold storage facilities outside of the main island of Java, are poorly developed.
The availability of imported products will be accommodated by the rapid growth of the modern retail sector; Japanese, Korean, and Western restaurant chains; bakeries and a well-developed tourism industry	Import regulations are often complex and non-transparent, thus requiring close business relationships with a local agent. Getting an ML number for imported retail packaged food products is complicated but required. Labels must be written in Indonesian and attached before entering Indonesia.
Many Indonesian consumers are aware of the quality and safety of the U.S. products.	Prices of imported products are relatively high compared to locally produced products.
Low Duties: Duties on most food are 5%	Consolidated shipments with products from several

	suppliers are often more cost effective for Indonesian retailers. This increases documentation problems.
More urban women entering the workforce with less time available for shopping and cooking increasingly focusing on convenience.	Product shelf life should be considered for shipments to Indonesia due to the extended transportation and inconsistent (non-transparent & unpredictable) custom clearance procedures & time.
Some multinational companies have commissary and catering services that need imported products.	Third-country competition and promotion remains strong, especially from Australia, New Zealand and China. Food product imports from Malaysia, Philippines, and Thailand are growing. Bilateral free trade agreements provide opportunities to competitors.
U.S. Fresh Food of Plant Origin (FFPO) safety control system has been recognized. The U.S. horticulture products are allowed to enter Tanjung Priok – port of Jakarta.	The GOI intends to review FFPO recognition every two years. Current regulations stipulate that only three sea ports and one airport are allowed as a horticultural entry points. Approximately 39 horticultural products must have an import recommendation from Indonesian Ministry of Agriculture, and import permit from Ministry of Trade before imported to Indonesia.
GOI approved a number of several U.S. meat and many U.S. dairy establishments to export products to Indonesia. GOI lifted the ban of imported U.S. bone-in meat on June 17, 2013.	Animal-based food must be certified “halal”. Import recommendations from MOA and MOT are required to obtain an ML.
Indonesia also does not produce sufficient quantities of beef, dairy products, tree nuts, temperate zone fresh fruit and vegetables, and pet food.	U.S. freight costs are high relative to competing origins

II. ROAD MAP FOR MARKET ENTRY

Entry Strategy

An effective way to enter the Indonesian market is to appoint an agent. An agent can help assure the widest product distribution as well as undertake the marketing efforts necessary to build product awareness. In some situations, it may make sense to sell directly to supermarkets and/or to appoint them as an exclusive distributor. This is particularly recommended for specialty products which are unlikely to generate volumes sufficient to merit the interest of an agent. Initial sales efforts in Indonesia should nevertheless include visits with potential agents as well as with key retailers to gain an understanding of the market.

Market Access for Imported Food Products

Labeling

Requirements for food product labeling (primarily for packaged food for retail sale) are broad in scope. The National Agency for Drug and Food Control (BPOM) regulations require labels to be written in

Indonesian and to note GMO-derived ingredients. As of January 2013, supplementary labels should be affixed prior to customs clearance (before arriving in Indonesia). Statements or claims on the benefit of the food product shall only be included if they are supported by scientific facts which can be accounted for. In addition to BOPM labeling regulations, exporters are expected to comply with the new Food Law 18/2012, and the Consumer protection Act of 1999.

Imported Product Registration Number (ML)

All processed food products imported in retail packaging must be registered with BPOM prior to customs clearance. The registration process should be conducted by a local agent or importer. The process for registration of food is complex, often non-transparent, costly, and time consuming due to the detailed requirements regarding supporting documentation that should be carried out before shipping. However, the ML registration process has improved slightly by the implementation of the E-registration for low risk processed food products (707 kinds of food products) since early 2013.

BPOM regulations require importers to apply for an import permit on animal based food products, including processed products, from the Director General of Livestock Service, Ministry of Agriculture. This permit must be obtained before an exporter gets an ML number.

Entry Permit (SKI)

In March 2008, BPOM released a regulation (amended in 2013) which stated that all imported food material/ingredients, including processed foods, must obtain an entry permit (SKI) from the head of BPOM for every shipment. The SKI is needed to release the products from customs. To obtain the permit, an importer must provide supporting data and documents.

Horticultural and Animal-Based Food Products

MOA and MOT regulations state that the GOI will allocate import quantities for imported horticultural products every six months and meat products every three months. (Note that the GOI claims it will approve any quantity the importer requests). These regulations limit the availability of imported fresh fruits in retail outlets, as more than 60 percent of hypermarket fruit sales are of imported fresh fruit. This regulation also hinders meat imports, as it requires meat to be ordered and shipped within three months from the issuance of the import recommendation. Since 2011, MOA and MOT regulations limit the sale of imported beef to the hotel and restaurant industry.

Halal

Indonesian halal requirements pose challenges to U.S. food exporters. According to Indonesian regulations, halal products include foods, beverages, drugs, cosmetics, biochemistry products, and genetically modified products. Indonesia's Congress, or *Dewan Perwakilan Rakyat* (DPR), is currently debating the *Guarantee on Halal Products Law*. It is uncertain when the DPR will vote on this law, but a new law appears forthcoming. The law will likely require halal products intended for consumption, use, or wear to be in accordance with Islamic Law. Halal products will also likely be required to bear a recognized halal certificate and be labeled with a recognized halal symbol.

Duties and Taxes

Although most of food and agricultural product import duties are 5 percent, most imported products are also assessed a value added tax of 10 percent and sales tax of 2.5 percent. On April 7, 2010, the Ministry of Finance (MOF) imposed new import duties on alcoholic beverages containing ethyl alcohol.

This regulation replaced the ad valorem tariff with a specific tariff charged at the rate of Rp14,000/liter for beer, Rp 55,000/liter for wine, and Rp, 125,000/liter for whisky, rum, and other distilled spirits. The former luxury tax (75 percent) was removed. Alcoholic beverages are imported based on a quota set by MOT every April.

Competition

U.S. food products are sometimes less competitive in Indonesia due to high freight costs relative to competing origins and locally produced products. Consolidated shipments with products from several suppliers are highly favored and are often more cost effective for Indonesian importers. Competition remains strong from countries in the region, especially Australia, New Zealand and China. Food product imports from ASEAN countries such as Malaysia, Philippines, and Thailand are also growing.

Local food producers are largely specialized on conventional Asian staples. As a result, many premium categories and western-style foods are underserved in Indonesia. Indonesian consumers also associate quality and safety with U.S. food products. These two points are possible advantages for U.S. businesses seeking to export to Indonesia.

Market Structure

Distribution System

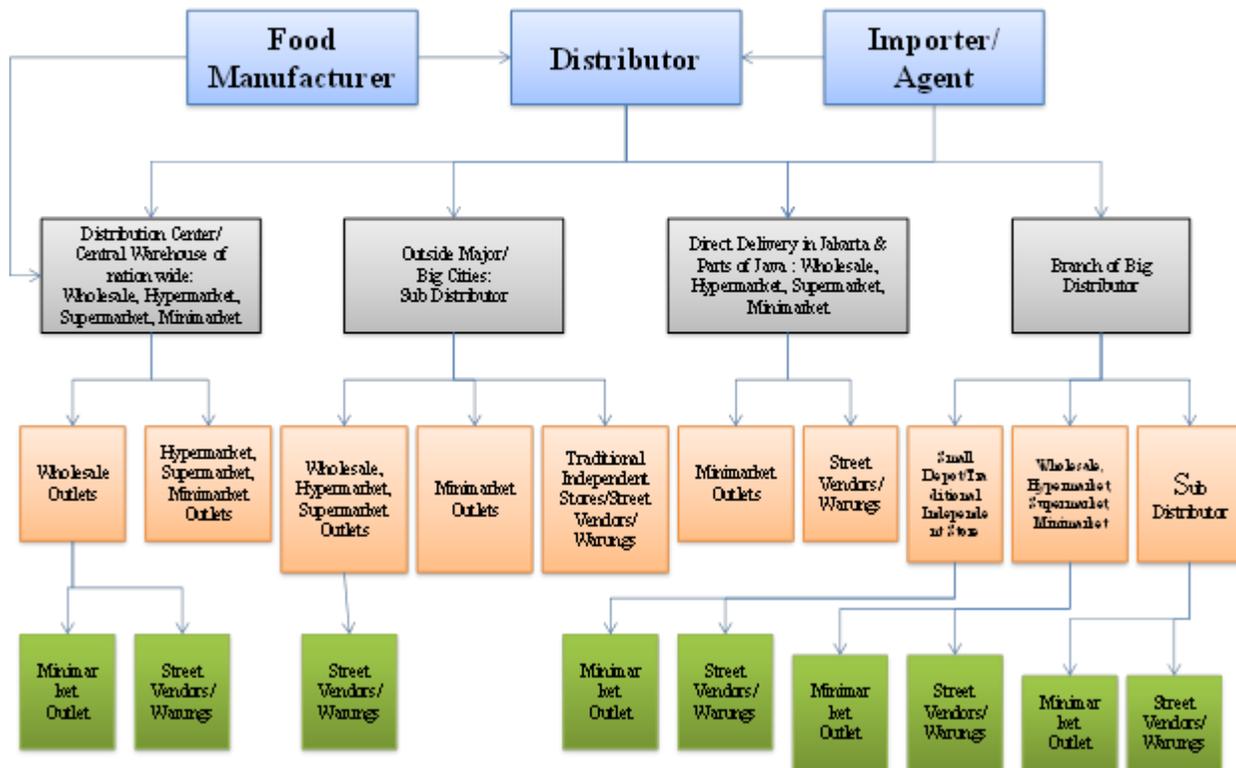
Due to the geographic isolation of the Indonesian archipelago, the distribution system is complex. Indonesian infrastructure is often inadequate, especially outside of Java and major cities. The ability to move frozen and refrigerated products is limited. There are several national distributors, generally subsidiaries of consumer goods and food manufacturers, who serve the whole country. There are also numerous agents and distributors with a more local reach. There are hundreds of wholesalers (traditional wholesalers) and millions of retailers.

Inadequate port facilities are often cited as the single largest distribution constraint. Shallow drafts limit ports to small ships, and inadequate loading/unloading facilities and frequent congestion are frequently cited problems. Poor roads and bad traffic in and out of ports are also a constraint. Distribution firms also cite unreliable shipping schedules and an inadequate number of small ships serving Eastern Indonesia, particularly during bad weather periods. This can result in shortages and obligate firms to maintain large and costly inventories.

Most imported products are sold through the modern retail stores, (hypermarkets, supermarkets, wholesalers, convenience stores, and minimarkets). Imported products often move to a distributor or agent, who in turn, sells directly to modern retail outlets. Delivery of the products may be direct to stores or to the warehousing facilities of the retailer. Only a few retailers buy directly from foreign suppliers and assume responsibility for logistics. There are about 10 major cities that serve as distribution hubs in Indonesia including: Bandung, Yogyakarta, Surabaya, Denpasar, Makassar, Manado, Balikpapan, Banjarmasin, Medan, Pekanbaru, Padang, Palembang, Batam. Products moving through the traditional sector face a more extensive distribution process. Generally, products move to a distributor's warehousing facilities in a hub city, then to sub-distributors and wholesalers for delivery to retailers.

Figure 4: Indonesia: Distribution Channels

Indonesian Retail Food Sector: Distribution Channels



Trends in Distribution

Although the modern retail sector is expanding rapidly, the traditional distribution systems are expected to remain prevalent in the short term. Over the long term, modern retail distribution channels are expected to become more efficient as direct procurement from suppliers increases. Under current regulations, retailers can procure most imported supplies directly, with the notable exception of imported horticultural and beef products. Efficiencies will also be gained as central warehousing and distribution centers expand throughout the country. Inadequate infrastructure on several of the Islands hinders this expansion.

The success of big retailer chains, wholesalers, and hypermarkets in offering Indonesian consumers a wide variety of products at lower prices is expected to stimulate the growth of imported food sales. More middle and low-income consumers are using organized retail outlets. Increasing competition will force existing supermarkets and other modern retailers to focus on targeted consumer groups, to become more sophisticated in their marketing efforts, and to improve store operation efficiencies. The number of minimarkets and other small stores will continue to grow. The greatest expansion is anticipated on the islands of Java and Bali, in residential areas and cities outside of Jakarta.

- A. SUPERSTORES, SUPERMARKETS, HYPERMARKETS OR SUPERCENTERS, CLUB AND WAREHOUSE OUTLETS.

There are four players in the hypermarket group (including wholesalers) and five in the supermarket group in Indonesia. Hypermarket and supermarket businesses are the most likely to sell imported products. Imports account for 5 to 30 percent of the food items sold in each store, increasing to 60 percent for specialty retailers catering to high-end consumers. ML number registration issues limit the variety of brands that importers can choose from, making small consignments and mixed containers more difficult.

Table 4. Indonesia: Wholesale, Hypermarket and Supermarket outlets

Retail Name & Market Type	Ownership	Sales /year 2012	No. of Outlets 2012	Locations (city/region)	Purchasing Agent Type
Carrefour	Trans Retail Indonesia, PT (Local per November 2012)	N/A	69 hypermarket format 11 Carrefour Express 3 Carrefour market	Jakarta, several cities in Banten West Java, Central Java & East Java; Palembang, Medan, Batam, Makassar, Denpasar	Direct Agent/ Importer, Distributor
Giant	Hero Supemarket Tbk, PT (Dairy Farm – Hongkong)	Net revenue from Hero retail group IDR 10.5 trillion	As of July 2013 46 hypermarket 103 supermarket	Jakarta, several cities in Banten, West Java, Central Java, East Java; Bali, Bandar Lampung, Bengkulu, Jambi, Pekanbaru, Banjarmasin, Balikpapan, Samarinda	Direct Agent/ Importer, Distributor
Hypermart	Matahari Putra Prima Tbk, PT (Local – Temasek, Singapore)	N/A	As of July 2013 86 Hypermart 7 Matahari convenience stores, 2 Bigmart stores	Jakarta, several cities in Banten, West Java, Central Java, East Java, North Sumatera, Riau, Jambi, South Sumataera, Bengkulu, Bandar Lampung, Pontianak, Palangkaraya, South Kalimantan, Balikpapan, Samarinda, North Sulawesi, Gorontalo, Palopo, Makassar, Kendari, Ambon, Jayapura, Kupang,	Direct Agent/ Importer, Distributor

				Bali	
Lotte Mart (former Makro Wholesale)	Lotte Shopping Indonesia, PT (South Korea per Oct 2008)	N/A	19 wholesaler 10 hypermarket	Jakarta, Tangerang, Serang, Bekasi, Bandung, Semarang, Yogyakarta, Solo, Sidoarjo, Medan, Pakanbaru, Palembang, Bali, Makassar, Banjarmasin, Balikpapan	Direct Agent/ Importer, Distributor
Alfa Midi (bigger than minimarket but smaller than supermarket)	Midi Utama Indonesia Tbk, PT (Local)	Net revenue IDR 3.87 trillion from Alfamidi, Alfa Express & Lawson)	As of June 2013 514 Alfamidi 74 Alfa Express	Jakarta, Bogor, Tangerang, Depo, Surabaya, Makassar, Samarinda, Medan	Direct Agent/ Importer, Distributor
Food Mart group (Formerly Matahari Supermarket)	Matahari Putra Prima Tbk, PT (Local-Temasek, Singapore)	N/A	20 specialty stores,	Jakarta, Tangerang, Bogor, Krawang, Cirebon, Klaten, Purwokerto, Yogyakarta, Surabaya, Jember, Bali, Balikpapan, Samarinda, Ambon, Padang	Direct Agent/ Importer, Distributor.
Hero	Hero Supemarket Tbk, PT (Dairy Farm – Hongkong)	Net revenue from Hero retail group IDR 10.5 trillion	As of July 2013 39 outlets	Jakarta, Bekasi, Bogor District, Tangerang, Tangerang Selatan, Bandung, Yogyakarta, Surabaya, Sidoarjo, Malang, Bali, Mataram, Tembaga Pura, Makassar, Balikpapan, Samarinda,	Direct Agent/ Importer, Distributor.
Lion Superindo	Lion Superindo – Gelael, PT (Local-	N/A	As of July 2013 109 outlets	Jakarta, several cities in Banten, West Java, Central Java & East Java;	Direct Agent/ Importer, Distributor

	Delhaize Belgium)			Palembang (18 cities)	
Farmer Market	Supra Boga Lestari Tbk, PT (Local)	N/A	7 outlets	Jakarta, Bogor, Tangerang, Kerawang	Direct Agent/ Importer, Distributor

Source: Various

Table 5. Indonesia: High-end Supermarkets and Specialty Stores

Retail Name & Market Type	Owner ship	Sales /year 2012	No. of Outlets	Locations (city/region)	Purchasing Agent Type
Bali Deli – specialty store	Cipta Adi Karsa, PT (Local)	N/A	1 outlet	Bali	Agent/Importer, Distributor
Dijon Food Specialities	Alamboga Internusa, PT (Local)	N/A	1 outlet	Bali	Direct, Agent/Importer, Distributor
The Food Hall (formerly Sogo) –specialty store	Panen Lestari Internusa, PT (Local)	N/A	10 food hall 10 daily food hall	Jakarta, Tangerang Selatan, Depok, Bekasi	Agent/Importer, Distributor
Gourmet Garage – specialty store	Wahana Boga Nusantara, PT (Local)	N/A	1 outlet	Jakarta	Direct, Agent/Importer, Distributor
Kemchicks – specialty store	Boga Catur Rata, PT (Local)	N/A	2 outlets	Jakarta	Agent/Importer, Distributor
Lucky Supermarket Group	(Local)	N/A	4 Grand Lucky, 3 Berastagi, 8 Rejeki fruit boutiques	Jakarta, Surabaya, Pakanbaru, Medan,	Direct, Agent/ Importer, Distributor
Pepito – Speciality store	(Local)	N/A	3 outlets	Bali	Agent/Importer, Distributor
Ranch Market – specialty store	Supra Boga Lestari Tbk, PT (Local)	N/A	10 outlets	Jakarta, Surabaya	Direct, Agent/Importer, Distributor.
Setiabudhi –	(Local)	N/A	1 outlet	Bandung	Agent/Importer,

specialty store					Distributor.
Major Fruit Boutique					
All Fresh	(Local)	N/A	7 outlets	Jakarta, Bogor, Tangerang, Bekasi	Agent/Importer, Distributor.
Jakarta Fruit Market	(Local)	N/A	3 outlets	Jakarta	Agent/Importer, Distributor.
Total Buah	(Local)	N/A	22 outlets	Jakarta, Bogor, Tangerang, Bekasi, Bandung, Surabaya	Agent/Importer, Distributor.
Japanese					
Cosmo Japanese Food Center – specialty store	(Local)	N/A	3 outlets	Jakarta, Surabaya	Agent/Importer, Distributor.
Papaya – Japan specialty store	(Local)	N/A	7 outlets	Jakarta, Bandung, Surabaya, Bali	Agent/Importer, Distributor.
Korean					
Hanil Mart – Korean specialty store	(Local)	N/A	1 outlet	Jakarta, Tangerang	Agent/Importer, Distributor.
Mu Gung Hwa – Korean specialty store	(Local)	N/A	4 outlets	Jakarta	Agent/Importer, Distributor.
New Seoul Super- Korean specialty store	(Local)	N/A	1 outlet	Jakarta	Agent/Importer, Distributor.
Wijaya Mart	(Local)	N/A	2 outlets	Jakarta	Agent/Importer, Distributor.
Korean Mart	(Local)	N/A	2 outlets	Bandung	Agent/Importer, Distributor.

Source: Various

Table 6. Indonesia: Some Regional Supermarkets

Retail Name & Market Type	Ownership	Sales /year 2012	No. of Outlets	Locations (city/region)	Purchasing Agent Type
Borma	(Local)	N/A	15 outlets	Bandung, Cimahi	Agent/Importer, Distributor.
Hari-Hari Supermarket	(Local)	N/A	8 outlets	Jakarta, Tangerang Selatan, Bekasi	Agent/Importer, Distributor.
Hardy's Supermarket	Hardy's Retailindo, PT	N/A	10 Hardy's Supermarket	Bali	Agent/Importer, Distributor.

	(Local)		2 Hardy's Gourmet		
Luwes Group	(Local)	N/A	8 outlet	Solo, Semarang, Purwodadi, Pati	Agent/Importer, Distributor.
Macan Yaohan	(Local)	N/A	6 Supermarket 7 Macan Mart (Minimarket)	Medan	Agent/Importer, Distributor.
Maju Bersama	(Local)	N/A	6 Supermarket 2 Maximart (high end target market)	Medan	Agent/Importer, Distributor.
Rita Supermarket	(Local)	N/A	7 outlets	Tegal, Purwokerto, Wonosobo, Cilacap, Kebumen,	Agent/Importer, Distributor.
Sabar Subur	Sabar Subur Makmur Sentosa, PT (Local)	N/A	4 outlets	Tangerang	Agent/Importer, Distributor.
Sri Ratu	(Local)	N/A	9 outlets	Tegal, Pekalongan, Purwokerto, Semarang Madiun, Kediri	Agent/Importer, Distributor.
Suzuya Supermarket	(Local)	N/A	11 outlets	North Sumatera, Aceh	Agent/Importer, Distributor.
Tiara Dewata Group	Tiara Dewata Bali, PT (Local)	N/A	4 outlets	Bali	Agent/Importer, Distributor..
Tip Top	Tip Top, PT (Local)	N/A	6 outlets	Jakarta, Tangerang, Bekasi, Depok	Agent/Importer, Distributor.
Toserba + Griya Supermarket (Yogya Group)	Akur Pratama, PT (Local)	N/A	38 Toserba Yogya 22 Toserba Griya 10 Griyamart 4 Yogya Xpress	Jakarta, West Java, Semarang	Agent/Importer, Distributor.

Source: Various

B. COVENIENCE STORES/MINIMARKET, GAS MARTS, KIOKS

Minimarkets are rapidly growing in popularity throughout urban and suburban Indonesia. This is especially true in cities outside of Jakarta. Indonesian minimarkets carry essential staple goods, some frozen items, and fresh fruits. They are located close to residential areas, office buildings, or areas with high footfalls. Most minimarket chains have their own distribution facilities. Purchasing from manufacturers, importers or distributors is centralized and items can be delivered to a central warehouse or directly to stores. Imported fruits are available in some of these stores.

Table 7. Indonesia: Convenience Store/Minimarket Outlets

Retail Name & Market Type	Ownership	Sales/year 2012	No. of Outlets 2012	Locations (city/region)	Purchasing Agent Type
Alfa Minimarket	Sumber Alfaria Trijaya, PT (Local)	N/A	7,064 (includes 2055 franchise stores)	Jakarta, Bogor, Bekasi, Tangerang, Java, Bali, Lampung	Agent/ Importer, Distributor.
Circle K (convenience)	Circleka Indonesia Utama, PT Franchise	N/A	As of June 2013 300 outlets	Jakarta, Bogor Batam, Bandung, Bali, Yogyakarta	Agent/ Importer, Distributor.
Indomaret	Indomarco Prismatama, PT (Local)	N/A	8,039 outlets (includes 2,837 franchise stores)	Java , Madura, Bali, Sumatera, Sulawesi	Agent/ Importer, Distributor.
Mini-mart (Convenience)	(Sentra Ritelindo, PT) (Local)	N/A	80 outlets	Bali	Agent/Importer, Distributor.
Star Mart	PT Hero Supermarket Tbk, PT) (Local)	N/A	151 outlets	Jakarta	Agent/Importer, Distributor.
Yomart	Yomart Rukun Selalu, PT & Griya Pratama, PT (Local)	N/A	203 outlets	West java	Agent/Importer, Distributor.
Lawson (Convenience)	Midi Utama Indonesia Tbk, PT	N/A	80 outlets	Jakarta, Bogor, Depok, Tangerang,	Agent/Importer, Distributor.

	Franchise			Bekasi, Bandung, Bali	
Seven Eleven	Modern Putra Indonesia, PT Franchise	IDR 508.2 billion (2012)	As of May 2013 125 outlets	Jakarta, Tangerang	Agent/Importer, Distributor.
Family Mart	(P Fadjar Mitra Indah) Franchise	N/A	As of March 2013 6 outlets	Jakarta	Agent/Importer, Distributor.
Ministop	Supra Boga Lestari Franchise	N/A	1 outlet	Tangerang Selatan	Agent/Importer, Distributor.

Source: Various

C. TRADITIONAL MARKETS – “MOM AND POP” SMALL INDEPENDENT GROCERY STORES AND WET MARKETS

The traditional sector maintains a majority market share in Indonesian food retailing. This sector includes warungs and small stalls, often found in traditional markets. Distribution channels are long and complex. Few imported products are carried by these outlets, with the exception of fresh fruit.

Imported apples, mandarins, oranges, table grapes and pears are commonly found in wet markets, although in recent months their availability has been disrupted due to evolving import regulations.

III. COMPETITION

Local companies have strong position in the food and beverage market

The local industry dominates the markets for baked goods, noodles and wheat-based products, snacks, frozen poultry products, processed dairy products such as cheese and yogurt, canned fish, soft drinks, teas, tropical fruits and vegetables, and fresh sea food. Businesses featuring fresh produce compete on their ability to supply competitively priced locally grown products, while businesses featuring processed food and beverages compete on brand name. There are several multinational companies in this sector, including Unilever, Nestle, Kraft, Danone, Heinz, Frito Lay, and Effem.

Competition in the import market

Temperate fresh fruit, processed fruit and vegetables, beef, french fries, tree nuts, and pet foods are mostly imported. Primary competing suppliers include China, Thailand, Australia, India, New Zealand, Netherlands, Brazil, Philippines, Vietnam, and France.

Table 8. Indonesia: Competition between Domestic Goods and Imports; 2012

Product Category	Major Supply Sources (%)	Strengths of Key Supply Countries	Advantages and Disadvantages of Local
------------------	--------------------------	-----------------------------------	---------------------------------------

	Volume)		Suppliers
<p>Fresh Fruit</p> <p>Net volume import: 776,679 Ton</p> <p>Value: \$824 million</p>	<p>China 55.7%</p> <p>Thailand 18%</p> <p>U.S. 9.2%</p> <p>Australia 2.6%</p>	<p>China supplies: fuji apples, yalie pears, Shandong pears, red globe table grapes, mandarines, oranges, lemons</p> <p>Thailand supplies: longans, durians, mangos</p> <p>U.S. supplies: apples, table grapes and oranges</p> <p>Australia supplies: pears, red globe table grapes, oranges</p>	<p>Only tropical fresh fruit is produced locally, although supplies are inconsistent</p>
<p>Fresh Vegetables</p> <p>Net volume import: 690,218 Ton</p> <p>Value: \$384 million</p>	<p>China 70%</p> <p>India 7.5%</p> <p>Vietnam 5%</p> <p>Thailand 4.9%</p> <p>U.S.- minor supplier (1% share)</p>	<p>China supplies: onions, shallots, carrots, potatoes, chilies</p> <p>India supplies: onions, shallots</p> <p>Vietnam supplies: shallots, chilis</p> <p>Thailand supplies: shallots</p>	<p>No onions are produced locally. Local shallot and chili production cannot meet domestic demand during the rainy season</p> <p>Only tropical fresh fruit is produced locally, although supplies are inconsistent</p>
<p>Processed fruit & vegetables</p> <p>Net volume import: 126,514 Ton</p> <p>Value: \$154 million</p>	<p>China 27.5%</p> <p>U.S. 21.8%</p> <p>Thailand 13.6%</p> <p>Netherlands 6.1%</p> <p>New Zealand 4%</p>	<p>China and Thailand supply processed fruit and vegetable products. Brands are well known and prices are competitive</p>	<p>Limited processed fruit and vegetable products are produced locally.</p>
<p>Snack food excluding nuts</p> <p>Net Volume import: 28,769 Ton</p> <p>Value: \$104 million</p>	<p>China 31.8%</p> <p>Malaysia 26.8%</p> <p>Belgium 11.1%</p> <p>Thailand 7.2%</p>	<p>ASEAN origin food snacks has a large market share due to price competitiveness, taste, and geographic proximity.</p> <p>Belgium supplies mostly chocolate based snack products</p>	<p>Local products are also abundant but consumers are willing to try new products.</p> <p>Domestic snack producers use imported food ingredients such as potato flakes, dairy, and corn</p>

	U.S.-minor supplier (1.2% share)		grits.
Pet foods Net Volume import: 28,212 Ton Value: \$31 million	Thailand 72.6% U.S. 15.6% France 3.8%	Thailand produces pet food under U.S. pet food company licenses.	No pet food is produced locally
Fruit & vegetable juices Net Volume: 14,008 Ton Value:\$29.7 million	Brazil 22.1% Thailand 17.3% U.S. 10.2% China 8.2% Austria 7.6% Australia 6.9% South Africa 5.2%	Geographic proximity gives Australia and ASEAN countries advantage for products with short product shelf life	Local fruit juices are limited due to limited fresh fruit supply.
Breakfast Cereals/Pancake Mix Net volume import:6,554 Ton Value:\$19.4 million	Philippines 56% China 17.2% Malaysia 10.9% Thailand 6.1% Australia 4.3% U.S.-minor supplier (1.5% share)	Multinational companies established their production facilities in ASEAN countries (such as Philippines and Thailand) to reach the market in surrounding countries.	Domestic manufactured produces limited variety of breakfast Cereals.
Tree nuts Net volume	Thailand 24.6%	Thailand supplies repacked tree nuts from the U.S.	Local tree nut production is limited to the cashew nut

import: 4,016 Ton Value: \$12.6 million	U.S. 21.6% Vietnam 20.5% Singapore 14% China 10.3%		
Red meats fresh, chilled, frozen Net volume import: 41,857 Ton Value: \$165.8 million	Australia 73% New Zealand 23% U.S. 3.7%	Australia and New Zealand offer competitive pricing and no reported cases of FMD and BSE	Shortage of supply. Most domestic production is sold fresh to traditional markets and modern retail outlets
Wine & Beer Net volume import: n/a Value: \$3.3 million	n/a Major supplier are Australia and France	Australia offers competitive pricing and geographic proximity. France is well known sources of wine	Population mostly Muslim. No domestic wine production. Local beer produced for a small segment of the population and tourists

Source: GTA

IV. BEST PRODUCT PROSPECTS

Many U.S. food items have strong sales potential in Indonesia. This is especially true of those for which no local substitutes are available. The best opportunities for imported food products in retail packaging exist in modern retail outlets in Jakarta, Bandung, Surabaya, Bali (tourism), and Medan (Sumatera). Potential also exists where foreign companies employ high numbers of expatriates, such as Balikpapan (Kalimantan), Lombok, Pekanbaru (Sumatera), and Timika (West Papua). The Indonesian expatriate community is diverse, with more expatriates coming to Indonesia from Asian countries.

There is typically at least one supermarket that caters to the expatriate community in every major city, supplying imported products. Good opportunities exist for good quality, moderately priced items with brand names well-known to expatriates. Because importers purchase in small quantities and transportation costs can be high, products are expensive compared to what expatriates pay at home.

A. *Products Present in the Market which have Good Sales Potential*

Fresh fruits demonstrate the best growth potential of any U.S. product category already present in the

Indonesian market. U.S processed fruit and vegetables products, as well as snack foods, have also shown growth. Some of the best-selling processed foods include frozen french fries, popcorn, corn chips, mixed fruit juices, frozen and canned vegetables, ice cream, raisins, jams, almonds, baking mixes, dressings, sauces, and seasonings.

Table 9. Indonesia: Products Present in the Market That Have Good Sales Potential

Product Category	2012 Import (Volume, T)	2012 Import (\$mil)	2012 Import from U.S. (\$mil)	5Yr. Avg Annual Import (Volume) Growth (%)	Import Tariff Rates (%)	Key Constraints to Market Development	Market Attractiveness for USA
Fresh fruit	776,679	824	109.4 (mainly apples, grapes & orange)	10.7	5 20% for mandarin & mangoes	<p>Competition from China, Thailand, Australia, South Africa, Vietnam, Egypt, Argentina.</p> <p>Current Government of Indonesia regulations inhibit some U.S. fresh fruit imports</p>	<p>Health awareness and rising middle class pushes the demand for quality fresh products.</p> <p>Lack of supply and quality domestic fruit products.</p>
Fresh Vegetable	690,218	384	1.9 (mainly potato and onion)	7.9	5 20% for fresh/chilled potatoes other than seed, shallot other than seed	<p>Competition from China, India, Vietnam, Thailand, New Zealand, Australia, Canada, Netherlands</p>	<p>Lack of supply and quality domestic products and huge demand of other vegetable types.</p>

					and carrot	ds Current Government of Indonesia regulations inhibit some U.S. fresh fruit imports	
Processed fruit & Vegetables	126,514	154	46.3 (mostly french fries, onion powder, citrus fruit prep, potato flakes, raisin, dates, sauces,)	13.1	Mostly 5%,	Competition from China, Thailand, Netherlands, New Zealand, Canada, India, Myanmar, Germany, Malaysia, Vietnam, Singapore, Belgium	Lack of local processed fruit and vegetable
Snack food excluding nuts	28,769	104	10.5 (mainly popcorn, corn chip, confectionary)	7.5	5 10 % for sweet biscuit waffle and wafer	Competition from China, Malaysia, Belgium, Thailand, Korea, India, Germany. The procedure for obtaining an Import Registration Number (ML) is complicated	Expansion of modern retail outlets creates opportunity to introduce and sell snack food products Snacking is very popular in Indonesian culture
Pet foods	28,212	31	5.1	21.0	5	Competiti	Demand

			(mainly dog & cat food)			on from Thailand, France, Australia, Brazil	exists as a niche market No domestic supply
Fruit & vegetable Juices	14,008	29.7	3.5 (mainly mixed fruit juice)	10.8	Mostly 10%	Competition from Brazil, Thailand, China, Austria, Australia, Taiwan Obtaining Import Registration Number (ML) procedure is complicated	Health awareness and a growing middle class drive demand for fruit-based products.
Breakfast Cereals/Pancake Mix	6,554	19.4	0.9 (mainly mix dough and cereals)	1.1	5	Competition from Philippines, China, Malaysia Obtaining Import Registration Number (ML) procedure is complicated	Health awareness, a growing middle class, and changing lifestyles drive demand for healthy, western and convenience food products.
Tree nuts	4,016	\$12.6	5.4 (mainly almond)	6.4	5	Price concern	Snacking is very popular in Indonesian culture

							Bakery sector is growing and use tree nuts as one of the ingredient.
--	--	--	--	--	--	--	--

Note: No data on the size of the market

B. Products Not Present in Significant Quantities but That Have Good Sales

There are good opportunities for high-value U.S. items that are not yet imported in significant quantities. These include potato chips, breakfast cereals, baby foods, organic foods, and specialty fruits (especially berries).

C. Products Not Present because They Face Significant Barriers

MOA and MOT regulations diminish opportunities for U.S. suppliers to supply the significant market for U.S. meat products in Indonesia. Indonesia has a potentially large market for beef, pork, and their processed products; beef heart and liver; and chicken and poultry processed products. Prior to the 2005 ban on U.S. beef, the most important U.S. sales item in the retail sector was beef offals sold through traditional outlets. In 2008, U.S. meat establishments restarted boneless beef exports to Indonesia, although pre-ban volumes have not yet been reached. U.S. bone-in beef and offal were prohibited a second time between April 2012 and June 2013 following a U.S. BSE finding. Indonesian imports of U.S. chicken parts, which have high market potential in Indonesia, were banned in 2000 due to questions regarding halal certification.

Table 10. Indonesia: Products Not Present in Significant Quantities but with Good Sales.

Product Category	2012 Import (Volume, T)	2012 Import (\$mil)	2012 Import from U.S. (\$mil)	5Yr. Avg Annual Import (Volume) Growth (%)	Import Tariff Rates (%)	Key Constraints to Market Development	Market Attractiveness for USA
Red Meats, Fresh/Chilled/Frozen	41,857	165.8	19.3 (boneless frozen meat)	-4.8	5	Competition from Australia and New Zealand Government of Indonesia sets a quota and the	Lack of domestic supply

						regulations inhibit meat import	
Wine & Beer	N/A	3.3	0.3 (wine of fresh grape)	N/A	Specific tariff, IDR 14,000 and IDR 55,000/li ter	Competiti on from Australia, France, Portugal, Italy, Chile Governme nt of Indonesia sets a quota and regulations inhibit alcoholic beverage import and production	No domestic wine supply and limited domestic beer supply
Poultry Meat	439	1.2*	4.3 ** (poultr y prepare d meals, frozen turkey, prepare d /preserv e chicken meat)	-33.1	20 % for chicken wing	Governme nt of Indonesia do not allowed import of chicken whole & parts. GOI determine the export allocation of other poultry products per semester	Domestic chicken prices are high and turkey is not produced locally

Note: * GTA and ** BICO data

V. POST CONTACT AND FURTHER INFORMATION

The Foreign Agricultural Service (FAS), U.S. Embassy Jakarta maintains up-to-date information covering food and agricultural import opportunities in Indonesia and would be pleased to assist in facilitating U.S. exports and entry to the Indonesian market. Questions or comments regarding this report should be directed to FAS Jakarta at the following local or U.S. mailing address:

International Post: Foreign Agricultural Service
 U.S. Embassy Jakarta
 Sarana Jaya Building, 8th Floor
 Jl. Budi Kemuliaan I No. 1
 Jakarta 10110
 Tel: +62 21 3435-9161
 Fax: +62 21 3435-9920
 e-mail:agjakarta@fas.usda.gov

U.S. mail: Foreign Agricultural Service
 FAS
 Unit 8200 Box 437
 DPO, AP 96520-0437

For more information on exporting U.S. agricultural products to Indonesia and other countries, please visit the Foreign Agricultural Service’s Home Page: <http://usdaindonesia.org> and <http://www.fas.usda.gov>

VI. OTHER RELEVANT REPORTS

1. [Indonesia’s New Farmer Empowerment and Protection Law Introduce New Trade Barrier](#)
2. [Unofficial Translation of Ministry of Agriculture Decree No 4390/2013](#)
3. [Ministry of Agriculture and Trade Revised Regulations on Imported Horticulture Products](#)
4. [Ministry of Agriculture and Trade Revised Regulation on Imported Meat](#)
5. [FAIRS Export Certificate Report](#)
6. [FAIRS Country Report](#)
7. [Indonesia Extends Import Requirements on Food and Beverage Products](#)
8. [Indonesia Officially Recognize Safety Control System of United State’s Fresh Food of Plant Origin](#)
9. [Phytosanitary Requirement for Fresh Bulb](#)
10. [Exporter Guide Update](#)
11. [U.S. Fresh Foods and Vegetables Retain Access to the Port of Jakarta](#)
12. [New Indonesian Import Duties on Alcoholic Beverages](#)
13. [Mandatory Labeling of Imported Food and Beverage Products](#)
14. [New Import Duty on Beverage content certain Ethyl Alcohol](#)
15. [New Regulation on Alcoholic Beverages Excise Tax](#)

Table 11. Indonesia: Exchange Rate (Rp./1U.S. \$) on Period Month Ending Basis

Ye	Jan	Feb	Mar	Apr	Ma	Jun	Jul	Aug	Sep	Oct	Nov	Dec	Avg
----	-----	-----	-----	-----	----	-----	-----	-----	-----	-----	-----	-----	-----

Year	2006	2007	2008	2009	2010	2011	2012	2013	2014	2015	2016	2017	2018	2019
2006	9,369	9,280	9,117	8,826	9,212	9,353	9,124	9,119	9,205	9,110	9,165	9,020	9,158	
2007	9,090	9,160	9,118	9,083	8,828	9,054	9,186	9,410	9,137	9,379	9,376	9,419	9,187	
2008	9,304	9,051	9,199	9,234	9,318	9,225	9,118	9,153	9,378	10,995	12,151	10,950	9,756	
2009	11,330	11,975	11,575	10,713	10,340	10,225	9,920	10,060	9,681	9,545	9,480	9,400	10,354	
2010	9,365	9,335	9,070	9,012	9,180	9,038	8,952	9,041	8,952	8,928	9,013	9,014	9,075	
2011	9,057	8,823	8,709	8,574	8,537	8,597	8,508	8,578	8,823	8,835	9,055	9,170	8,772	
2012	9,000	9,158	9,188	9,180	9,565	9,468	9,485	9,573	9,588	9,605	9,605	9,670	9,424	
2013	9,680	9,713	9,745	9,722	9,811	9,929	10,277	10,936	11,532	11,076	11,997	11,946	10,542	

Source: National Statistical Agency (BPS-Badan Pusat Statistik) and Business Indonesia Daily Newspaper